Toolbox 2.0 Desk Aid
Case Management Transfer/Reassignment Functions

Individuals designated as Case Transfer Clerk will receive messages or tasks alerting to a new case referred to their location. This message will be available in the "Scheduler" module under "Tasks." If the CM Transfer clerk will not reassign the case in question, it will be the responsibility of the CM Transfer Clerk to notify the staff member responsible for making that assignment that a case awaits assignment in the "Case Transfer Inbox/Outbox." The most expeditious way of notifying this staff member would be to "Reassign the Task." This will move the task regarding the case awaiting assignment to the individual responsible for assigning the counselor.

Toolbox 2.0 Functions Associated with Case Transfer

Note: The only exclusive function associated with CM Transfer Clerk is the reception of tasks when a new case is assigned to the location.

Here are the Privilege Modules associated with Case Transfer/Assignment activity:

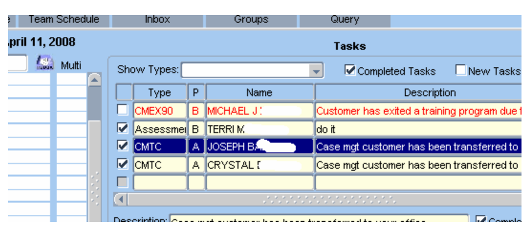
Reassign a Task

NOTE: Remember – reassigning the task does not reassign the case.

Frequently the CM Transfer clerk may not be the individual who desires to make the case assignment. In that situation, it may be most convenient to assign the task to another staff person (who has inbox/outbox privilege).

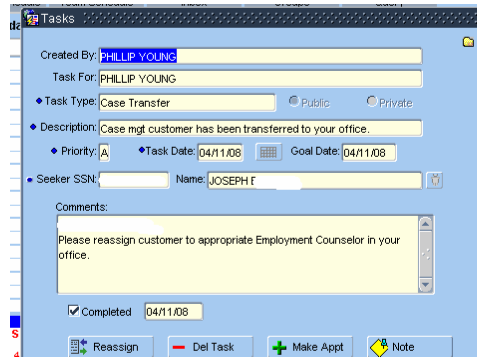
Step by Step:

1. Double click on the task

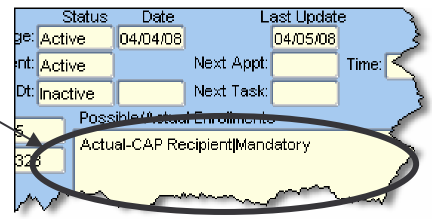


2. View the task:

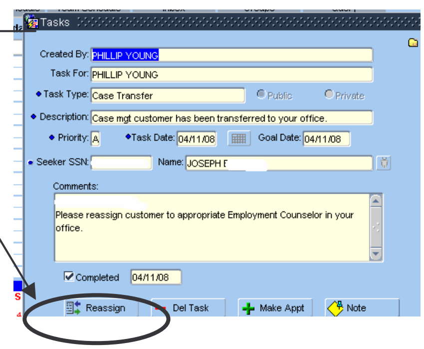
3. Click the “Folder” icon to open the seeker record.



4. View enrollments to determine the appropriate staff person for assignment.



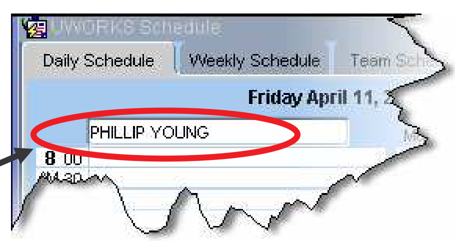
5. Return to Scheduler and again select the task.
6. Click “Reassign
7. Type in the last name of the individual who will ultimately assign this case. (CAP Supervisor etc.)
8. Click “Save.” (This will add a task to the staff person who has the privilege to access the “Case Transfer Inbox/Outbox” popup.)



Note: The only exclusive function associated with CM Transfer Clerk is the reception of tasks when a new case is assigned to the location.

If the CM Transfer Clerk is out of the office:

1. Other team members will have access to the CM Clerk’s scheduler:
   a. Open the scheduler



   b. Doubleclick in the name box.
   c. Select the CM Transfer Clerk’s name.
2. View the cases transferred into the office.
3. **Or those who have the “Case Transfer Inbox/Outbox” Privilege -- just view the incoming cases (if any) in the “Case Transfer Inbox/Outbox.”**

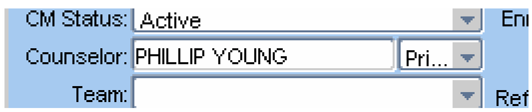
Note: A customer cannot be transferred to another office unless a primary counselor is assigned first.

Reassigning Case Managed Customers

Reassignment allows the transfer of cases ***within a region.***

Step by Step:

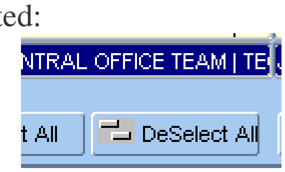
1. Navigate to CM search and list the cases assigned to the staff person.
    a. Click CM search icon 
    b. Double click the "Counselor" box and select the staff person's name.



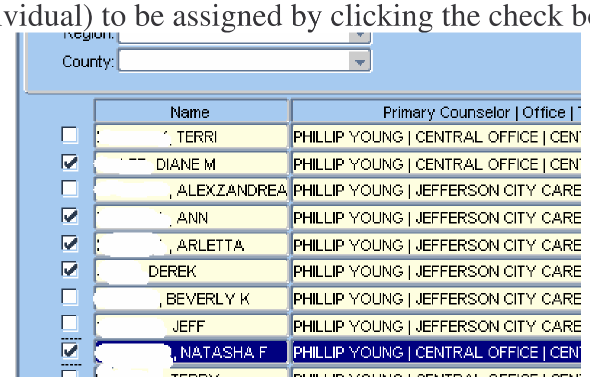
    c. Click "Search."

2. Review case load and determine assignments. ***Note: It is possible to reassign all cases at once.***

3. If individual cases are to be selected:



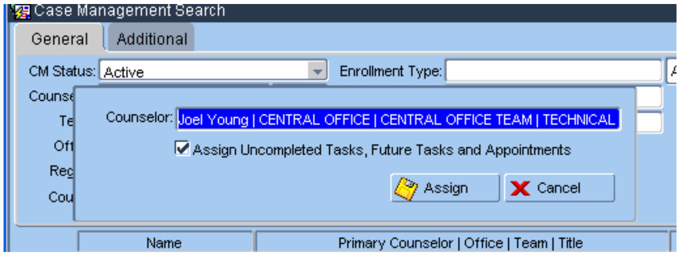
- Click Deselect All
    a. Select first group (or individual) to be assigned by clicking the check box to the



left of the name.

    b. Click the "Options" drop down and select "Reassign Counselor."

c. Double click in the box and select the destination counselor:



d. Note: Select here the counselor and the location to which case/cases are to be assigned.

e. Repeat this task until all cases have been assigned.

f. Note: the search screen will clear after each assignment. It will be necessary to press the "Search" button again to refresh the display until all desired cases have been assigned.

<u>Case Transfer</u>

a. Associated with a seeker record

b. Allows transfer of a case from office to office.

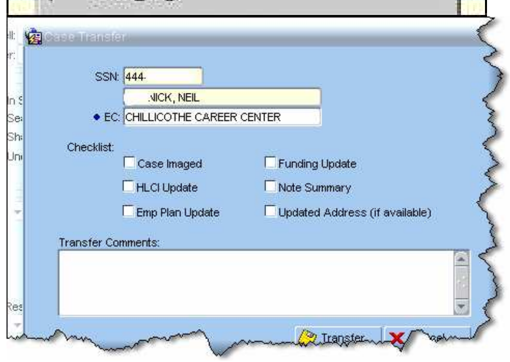
c. Transferred case shows up as a "Task" in the box of the "CM Transfer Clerk."

Step by Step:

1. Access the customer's record which should be transferred.

2. From the "Options" menu, select "Case Transfer."

3. Select the desired destination office from the "EC" Career Center box.
Note: if the zip code of the seeker matches the current office, the EC (Career Center Location) will be blank. If it is different from the current counselor's office, it will suggest the center matching the new zip. If this is not the desired destination, double click in the EC (Career Center) box and select the desired destination



center.

The checklist and comments are optional.

4. Complete any comments, and click "Transfer."

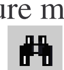
5. The case will then display in the "Inbox" of the destination office.

Case Transfer Inbox/Outbox

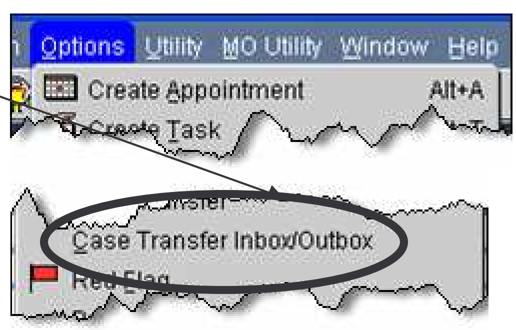
- ✓ Associated with a seeker record (Must display seeker options.)
- ✓ This is a display accessible from the seeker record under options which shows the incoming cases and the outgoing cases.
- ✓ As long as cases remain in the "Outbox," they can be retrieved through the "Retrieve" function.
- ✓ As long as cases remain in the "Out box," they can be reassigned to another office using the "Reassign" button.
- ✓ Cases remain in the "Inbox" until they are assigned to a counselor.
- ✓ Clicking the "Assign" button allows selection of a counselor to whom the case will be assigned.

Assigning a Case Manager to a Transferred (incoming) Case

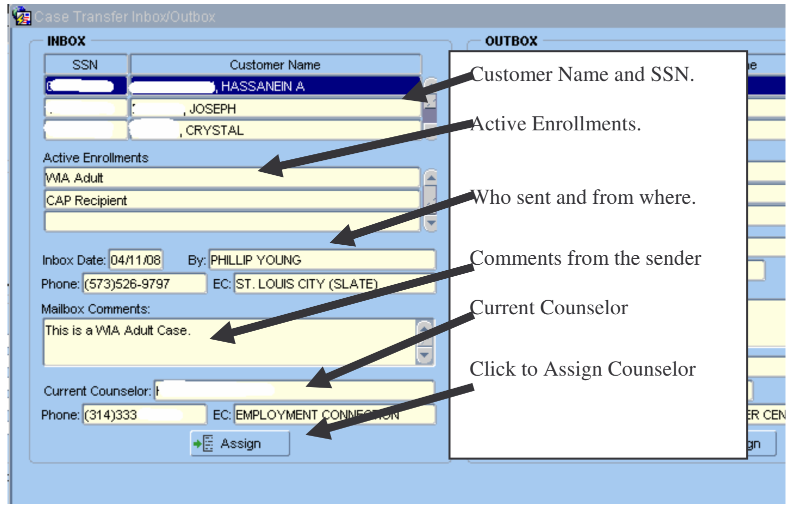
Step by Step:

1. This feature must be accessed in the context of the seeker *module:* Click on the seeker search icon:  It is not necessary to access a specific seeker.

2. Select "Case Transfer Inbox/Outbox." from the "Options" menu.



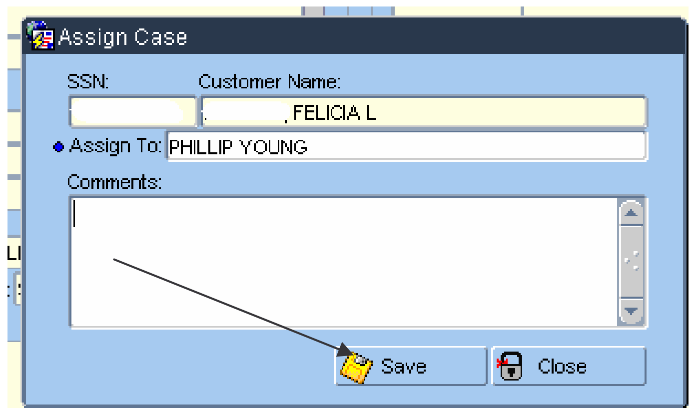
3. Move from seeker to seeker by using the scroll bar on the right or by clicking on the SSN of the seeker.
4. Select the desired seeker.
5. Determine the appropriate case manager for assignment.
6. Click on "Assign."
7. Select the desired counselor by either typing the last name or double clicking and picking from the list.



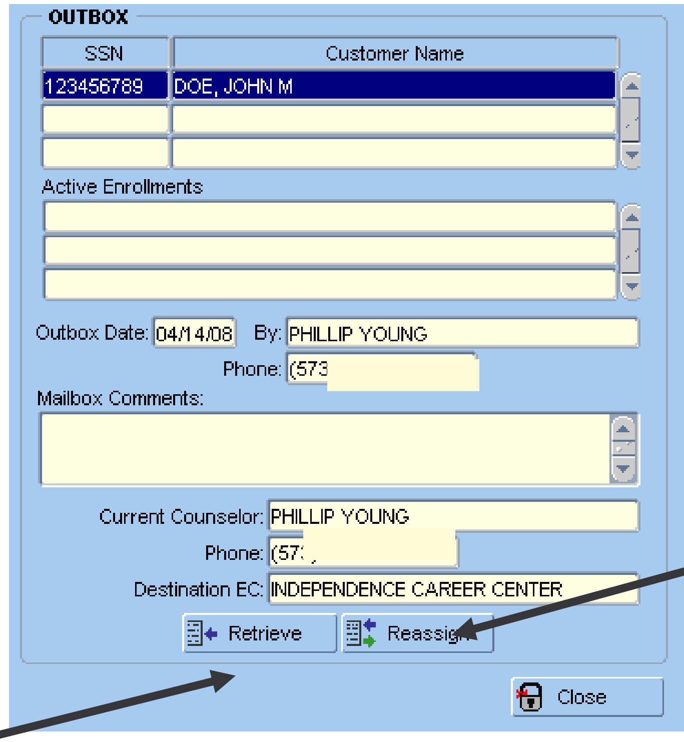
8. Select the desired counselor by either typing the last name or double clicking and picking from the list.

9. Add any comments.

10. Click "Save."



The Case Transfer Outbox also shows those cases that have been transferred out of an office which are still pending assignment in the destination office.



As long as the case remains in the "Inbox/Outbox" it can be "Retrieved." (Kept in the current office.)

The case can also be "Reassigned" to another office.